

**Program/Project Manager Responsibilities  
for the Initial Confirmation Review Process  
(Contact Jim Greaves with any questions)  
4/30/04**

**Note: This is a review peculiar to Code S. It is, in effect, the gateway between Phase A (Mission Definition) and Phase B (Preliminary Design).**

**The Initial Confirmation Readiness Review (ICRR)**

- The first step should be to schedule the ICRR. In order to avoid conflicts, the ICRR should be scheduled as early as possible – typically 2 to 3 months before the intended review. As with any PMC meeting, this is done through MEL.
- Once the ICRR is scheduled, the follow-up meeting with the Center Director and the Initial Confirmation Review itself at HQ should be scheduled through the lead secretary for Code 400 (see below). You should plan a one-month separation between the ICRR and the Initial Confirmation Review to allow time for a possible Delta-ICRR, and to close out any issues.
- The date of the ICRR should be coordinated with all other principal parties such as the RAO, the SMO, and independent assessment teams.
- The data package which the RAO uses to develop their independent cost assessment should be provided to that office at least 2 months before the ICRR. Kick-off meetings with the RAO should be held a month prior to that.
- A representative of the Enterprise AA should be invited to participate (as well as the Program Executive). The ICRR should be scheduled so as to facilitate this.
- You should plan on a 3 to 4 hour time block for the ICRR, depending upon the complexity of the mission.
- Ensure there is adequate time for each presentation (nominally 40 charts per hour of planned presentation time). Leave time for discussion.
- Make sure that each presenter brings at least 20 hard copies of their presentation for distribution to the PMC. To the extent possible, all presentations should be combined into a single set of charts.
- Typical components of an ICRR include the following:
  - Science Overview (including mission success criteria)
  - Mission Overview (description, organization/partners, WBS, cost, schedule, reserves, descope options, risk management, etc)
  - Independent Assessment Team (IAT) Report
  - RAO independent cost assessment
  - Project response to IAT and RAO (if any)
- For Space Science Missions, at both the ICRR and the Initial Confirmation Review at HQ, you should present a table summarizing compliance with the Phase A to Phase B checklist found in the Code S Handbook. A copy of the checklist is posted on our web page

- Chart packages from previous ICRR's are posted on our web page.

### **Meeting with Center Director**

- This meeting (and the Initial Confirmation Review at HQ) should be scheduled as soon as the ICRR date is set. It should be scheduled through the lead Code 400 secretary.
- This meeting should be held one week prior to the Initial Confirmation Review at HQ.
- Typical duration is one half hour
- Participants typically include Bill Townsend, the Head of 400, the Program Manager, and the Project Manager.
- At this meeting, key selected charts from the upcoming HQ Confirmation Review are reviewed. The format is sitting around the table, not a presentation.

### **The Initial Confirmation Review (ICR)**

- This meeting should be scheduled as soon as the ICRR date is set. If at all possible, it should be scheduled through the lead Code 400 secretary. (You should discourage your Program Executive or equivalent from scheduling the Initial Confirmation Review independent of the ICRR schedule.)
- The Initial Confirmation Review should take place one month after the ICRR.
- Typically, these reviews are an hour & a half long, but you should work with your HQ counterpart to get a feel of how much detail they want to hear.
- At least one representative from Code 100 (Diaz or Townsend) must attend
- Other invitees include the Head of 400, the Program Scientist, Program Executive, the PI (if any), and the Implementing Center Director (if appropriate)
- The presentations are generally a condensed version of the ICRR. Typical agenda is:
  - Introduction (process description, reviews held to date by Prj Mgr)
  - For Code S missions, include a table showing Phase A to B checklist compliance
  - Science Overview (by PI or Project Scientist)
  - Mission Overview (same topics as ICRR by the Project Manager)
  - Summary of findings & recommendations of IAT (by the Program Office)
  - Program Office recommendation
  - Center's position on readiness for Phase B (by Center senior representative)

**Contact Jim Greaves if you have any questions.**